Disclaimer, Terms of Use, and Copyrights

The following document is developed by Person Centered Tech Incorporated and is offered for educational purposes. It is not offered with any intent or implied warranty of fitness for a particular purpose nor is there any warranty, guarantee, or general claim that this will in any way provide any particular level of legal protection.

This document is not a substitute for legal advice or consultation, nor is it a substitute for clinical or ethical consultation or advice. State laws and licensing board rules vary, as do the needs of individual clients. You must modify this document – or rule out its use – as necessary according to your local laws and rules as well as the needs of your clients and your practice.

Unless otherwise prohibited by law, Person Centered Tech Incorporated will not be liable to you or to any other third party for: (a) any direct, indirect, incidental, special, punitive, or consequential losses or damages, including, but not limited to, loss of profits, loss of earnings, loss of business opportunities, or personal injuries resulting directly or indirectly from use of this document; or (b) any losses, claims, damages, expenses, liabilities, or costs (including legal fees) resulting directly or indirectly from use of this document. The conditions in this paragraph apply to any acts, omissions, and negligence of Person Centered Tech Incorporated that would give rise to a course of legal action. You agree to indemnify and hold harmless Person Centered Tech Incorporated against all claims and expenses (including attorney fees) arising from the use of this document.

This document is provided “as is.” Person Centered Tech Incorporated grants you right to use this document in your own health care practice. Your right to use this document is non-exclusive and may not be transferred to others. You may copy or modify this document according to your individual business needs, but you may not distribute copies of this document nor may you distribute documents derived from this one. You are also prohibited from using this document for educational purposes without prior written consent.

Your use of this document is also covered by Person Centered Tech’s [Terms of Service](https://personcenteredtech.com/terms-of-service/).

This document is © 2021 Person Centered Tech Incorporated.

Solo/+ Service Selection Worksheet

To use this Worksheet, follow the directions in Service Selection The Person Centered Tech Way: Workbook for Solo and Solo+ Practices.

# Services Recipe Function List

|  |  |  |
| --- | --- | --- |
| **Function** | **Service Name** | **Notes** |
| Record-Keeping |  |  |
| Payment Processing |  |  |
| Invoicing |  |  |
| Billing |  |  |
| Cloud Data Backup |  |  |
| Inbound Voice Calling |  |  |
| Outbound Voice Calling |  |  |
| Conventional (SMS) Texting |  |  |
| Secure Texting/Mobile Messaging |  |  |
| Conventional Email |  |  |
| Secure Email |  |  |
| FAX |  |  |
| Client Self-Scheduling |  |  |
| Appointment Reminders |  |  |
| Appointment Calendar |  |  |
| Intake Forms |  |  |
| Electronic Signatures for Online Forms |  |  |
| Contact Form on Website |  |  |
| Instant Messaging/Webchat (e.g. a chat interface on the practice website) |  |  |
| Videoconferencing (i.e. for online therapy) |  |  |
| Telehealth Waiting Room |  |  |
| Telehealth Whiteboard |  |  |
| Telehealth Breakout Room |  |  |
| Telehealth Video Recording |  |  |
| Telehealth Group/Family Meetings |  |  |
| E-Prescribing |  |  |
| Office Software (i.e. Writing Documents and Spreadsheets) |  |  |
| Web Hosting |  |  |
| Practice Internet Connection |  |  |
| VPN (Virtual Private Network) |  |  |
| Password Management |  |  |
| Directory Profiles |  |  |
| Accounting |  |  |

# My Service Cards

Paste below the Specific Service Cards that you chose for your recipe.

# My Services List

|  |  |  |  |
| --- | --- | --- | --- |
| **Service Name** | **BAA Executed Date  (Or reason no BAA is needed)** | **Service Tier** | **$/mo.** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **TOTAL COST $/Mo.** | | |  |